

## Toastmasters Club

### SAMPLE - Transition Checklist for New Executive

Month	Activity or Responsibility
April	<p>Early in April, <b>outgoing Sergeant at arms</b> contacts the Community Services booking office at the City of St. Albert to fill in a request form so we can have permission to use the current facilities for next year;</p> <p>Outgoing president will hand over confirmation letter to incoming President /Sergeant at Arms</p>
May	<p>When the new executive is elected, the outgoing president is responsible for bringing to the meeting a typed form listing the date and purpose of the meeting, the names of the outgoing executive who sign cheques (their executive positions listed next to their names), the name of the bank and account number and spaces for the outgoing signers to sign over authority to the incoming signatures. Space should also be provided for the new signatures to print their names and sign their names next to the names of their executive positions.</p>
May	<p>The <b>new President</b> checks in after the elections to confirm if the outgoing president has submitted the names of the new executive online to Toastmasters International</p>
May	<p><b>Outgoing President</b> appoints committees for key end of year activities</p> <ul style="list-style-type: none"> <li>- End of year socials committee</li> <li>- End of year awards committee</li> </ul>
May	<p>Towards the end of the regular meeting in May, the <b>incoming Sergeant at arms</b> works with the outgoing to complete an inventory count of paper supplies and puts in a request to the treasurer to order all necessary items for 2017-2018. Items include: Visitors Welcome Package, Ballot, Printing for timer forms, Awards Certificates, Promotional Flyers, small cups for toasts, paper plates, tissue.</p> <p>Also during the year be aware of which members will be receiving new awards, eg. Badges for competent communicator (CC), and order them four weeks before. At least five CC and CL manuals should be kept on hand for new members, who will hand in their other new manuals later, when they receive them from Toastmasters International</p>
May	<p><b>Outgoing President</b> hands over mailed copies of Club Leadership Handbook and Club Success Plan to incoming president</p>
May	<p><b>Outgoing President or Sergeant-at-arms</b> arrange for a venue for the summer meetings. <b>Incoming President and VP-Ed</b> coordinates to run meetings over the summer. This keeps the momentum going and helps the new executive to get their feet wet before the critical month of September.</p>
May	<p><b>Outgoing President</b> launches project to update club handbook for approval in September 2018</p>
June	<p><b>Outgoing president</b> works with the <b>outgoing Area Director</b> and <b>the incoming executive</b> to have an induction meeting/ceremony of the new officers. This induction would include walking through the process of logging on to the Club Central Platform of Toastmaster's</p>

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	International to conduct the official club business and to monitor the club performance dashboard. This session could be done at end of year socials meeting proposed for Sat Jun 3 or 10
June	<p><b>All club officers for 2017-2018</b>, both new and old, attend District’s Club Leadership Training. This counts as credit towards club performance of achieving one of the 10 requirements to be a Distinguished Club</p> <p><b>An important aspect of this training</b> is the Moment of truth session which helps the new executives evaluate where the club is and what the way forward should be. This information serves as the starting process of developing the club success plan for 2017-2018</p>
June	Early in <u>June</u> , the <b>incoming Vice President Public Relations</b> works with the outgoing to learn the process of advertising the club meetings on the community event calendar of City of St Albert
June	<p><b>Key transition activities for <u>outgoing president</u></b> on June 30 are:</p> <ul style="list-style-type: none"> <li>- To work with <b>incoming President</b> on updating the Club official contact on Toastmasters international (June 30)</li> <li>- To work with <b>incoming VP PR</b> to update the admin access and names of officers on the club’s Freehost website</li> <li>- Work with <b>incoming VP PR</b> to update Facebook admins and Meetup organizers</li> <li>- Work with <b>incoming VP Ed</b> to update club officers for 2017-2018 on easy speak</li> <li>- Confirm with <b>outgoing Treasurer</b> that club account signatories have been updated to have key incoming officers as signatories (Incoming President or VP-Ed and Treasurer)</li> </ul>
July	The new president works with the new executive to draft and finalize the club success plan by August
August	The new president finds out who the new Area Director is, makes contact and arranges for the first Area Director’s visit in September. The president also uses the opportunity to provide a finalized version of the Club Success Plan for review and feedback.
August	In late August, before the first regular meeting in September, the <b>VP Membership</b> has checked the cabinet in the school library to make sure there are at least ten guest packages to pass out to guests. If not, follow up with the Sergeant at Arms and President to make this available.
August - November	Starting in August, The President, VP Membership and VP Public Relations works together to launch a membership drive in preparation for the fall. Keep website and meet up content up to date, use dynamic content, make some noise on Facebook and Meet up. Be prepared for the first few meetings in Sept/Oct. <b>Follow up</b> via email with every new guest within the first 24- 48 hours, invite them repeatedly to future meetings, ask them to join the club and provide them with the reason on why they should. VP Education should work

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	in the back end to have mentors ready to go to work with new members. VP Education should arrange for special Educational sessions that focuses on special topic of interests to new members on getting their speeches started.
September	The new <b>club president</b> follows up with new Area Director to confirm first area visit and when the area contest will be in October.
September	The Treasurer collects dues for the whole year from each member and sends the required half yearly amount to Toastmasters International in California before October 1, or the date recommended by the Area Director.
September	The Director of Social Media presents submits a request to treasurer to renew Meet Up subscription
October	At the executive meeting, the <b>Club President</b> performs a quarterly review of the <b>club success plan</b> with the executive and the members
October	The <b>Club President</b> starts mobilizing the executive to attend second round of leadership training. The counts towards achieving a full credit for be Distinguished Club. Second round of training runs from November 1 – February 28 with the Toastmasters Leadership Institute (TLI) event of the district scheduled for November
December	The <b>Club President</b> and the <b>Sergeant at arms</b> confirms dates in January when the meeting events will not be available and that an alternative space is available from the booking made in April
January	At the executive meeting, the <b>Club President</b> performs a quarterly review of the <b>club success plan</b> with the executive and the members
January	The <b>VP ED</b> , in consultation with the executive, decides on the date for the combined International Speech Contest and the Evaluation Contest for the club, after finding out from the <b>Area Director</b> when the Area contest will be held. The club contest is usually held in early <b>March</b> . Once the date has been decided, the VP Ed tries to find at least four judges and a person from another club to come and give the DTM level speech for the Evaluation Contest.
January	<b>Club President</b> appoints nominating committee chaired by the <b>immediate Past President</b> to kick start club officers' succession plan and elections of new officers at the first business meeting in May
February	The <b>Club President</b> and the <b>Sergeant at arms</b> confirms dates in March when the meeting space may not be available during the spring break and that an alternative space is booked.
February	<b>Club President, VP PR and VP Membership</b> launch the spring new membership campaign

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February	<b>VP Education</b> works with the Executive to review the progress towards the educational awards and the impact of Spring Club and Area Contests to determine if extra meetings are required in March/April designated as an all-speech night.
March	The <b>Treasurer</b> sends the next installment of half yearly dues in early <u>March</u> to Toastmasters International.
April	At the executive meeting, the <b>Club President</b> performs a quarterly review of the <b>club success plan</b> with the executive and the members
April	<b>Immediate Past President</b> makes nomination forms available to potential candidates interested to be elected as officers for the next program year starting on July 1
Ongoing general reminder	The <b>Club President</b> sends out calendar invites to the Executive committee as placeholder for future Executive meetings: VP-Ed, VP PR, VP Membership, Treasurer, Secretary, Sergeant-Arms, Immediate Past President and Director of Social Media.
Ongoing general reminder	At each Executive committee meeting and Club Business Meeting, the <b>club executive</b> reviews and reports on its progress towards Distinguished Club status and lists which members are on their way towards achieving certain goals. The <b>VP ED</b> . helps them achieve these goals by making sure they receive the necessary opportunities on future agendas. Attention is also placed for membership retention.
Ongoing general reminder	The <b>Secretary</b> , at each Executive committee meeting and Club Business Meeting, will take notes that are focused on motions presented and seconded, decisions made, action items and relevant information contributing towards the progress of the club performance. Meeting notes of both business meetings and Executive meetings are circulated via email to the executive committee, as soon as possible (preferably within 72 hours) so that action items can be promptly addressed. Minutes of business meetings are circulated to the members via email for review few days ahead of the next business meeting.
Ongoing general reminder	The <b>President</b> sends the names of new office holders <u>elected as replacements</u> during the year, to Toastmasters International as soon as possible so this information can help them qualify for their Competent Leader award.
Ongoing general reminder	The <b>Sergeant At Arms</b> , when he has the list of nights we can't use the school, should book alternative spaces
Ongoing general reminder	<b>At each Executive committee meeting and Club Business Meeting</b> , the <b>club executive</b> reviews and reports on its progress towards Distinguished Club status and lists which members are on their way towards achieving certain goals. The <b>VP ED</b> . helps them achieve these goals by making sure they receive the necessary opportunities on future agendas. Attention is also placed for membership retention.